Document 22.10 Enhanced UI

Release Notes

Changelog

This changelog contains only significant or other notable changes to the document revision. Editorial or minor changes that do not affect the context of the document are not included in the changelog.

Rev	Date	Description
1.0	02-DEC-2022	Initial publication

Contents

What’s new in Document 22.10

- **InEight Compliance integration**
  - **Task creation from Document** – You can now create and pin a new task from the Document viewer or the Links tab of any module and sync it with InEight Compliance. Read more
- **Viewer**
  - **Compare files** – You can now compare different files in the Document viewer. Read more
- **Submittals**
  - **Track revision history** – You can now generate a revision history report from the History of a submittal. The report provides visibility into milestone dates and details per revision. Read more
  - **Set Details page** – The Set Details page has been added, so you can capture and view data against a submittal set. Read more
  - **Set ID field in submittals** – The Set ID field has been added to the Submittal Details page, so you can quickly see if the submittal is part of a set. Read more
  - **Transmittal of submittal sets** – You can now transmit submittal sets. Read more
  - **Upload documents as managing company** – –Managing companies can now upload documents. This helps manage submittals for self-performing work or when the subcontractor or vendor is not uploading deliverables in Document, for example, if they email the documents. Read more
- **Documents**
  - **Holding area processing prompt to supersede documents under review** – When the project Settings > Document > **Allow superseding documents under review when processing holding area documents** setting is selected, and you want to upload a new version or revision of a document that is under review, you are now prompted to either proceed with superseding some documents or cancel processing of the document from the holding area. Previously, the document was automatically superseded. Read more
  - **Folder export** – You can now select a folder in the Documents register and export it and all its contents. The export includes a cover sheet with navigational links and an associated Microsoft Excel spreadsheet with the folder structure data. Read more
  - **Reviewer type filter in Review pages** – An additional column has been added to the review grids that lets you filter entries by review type. This feature lets you easily and more effectively locate documents that require your attention, for example, when you are a mandatory reviewer.

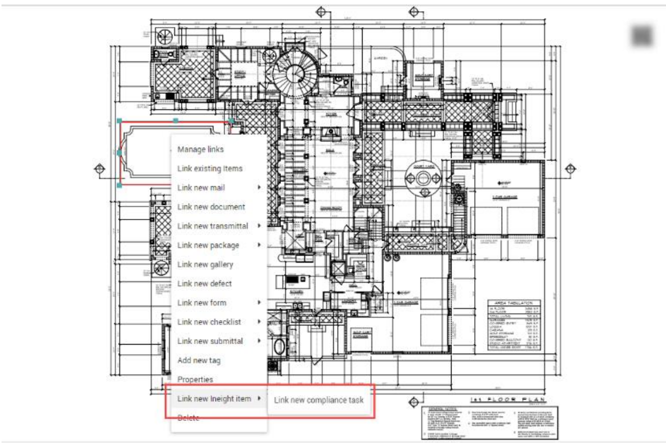
- **Transmittals**
    - **Automatically notify recipients of future revisions** – Recipients who will not be able to access future revisions of a transmittal are now shown in a warning message. This helps to show who will not receive access to future revisions and notifications on future revisions. Read more
- **Mail**
    - **Option to assign reference numbers when saving drafts** – A new project setting on the Miscellaneous tab has been added, so projects can specify whether a reference number is assigned or not assigned when saving a mail as a draft. Previously, a reference number was always assigned when saving mail as a draft. Read more
- **Registers**
    - **Copy metadata text** – You can now copy data from a single cell on a register. When you right-click on a cell, the Copy text option is shown. Click **Copy text** to add the cell contents to the clipboard, and then paste elsewhere as needed.
- **Project announcements**
    - **Edit project announcements** – All administrators can now edit or delete project announcements in the Project Announcements panel of the dashboard. Previously, only the primary administrator could edit or delete announcements.
- **Configuration support**
    - **Configure Lot section in Forms** – You can now configure the information to show in the Lot section of a form, such as lot reference number, or title. To configure this for any of your existing form types, you must contact your InEight representative.
    - **Support for dynamic tables in Forms** – You can now create dynamic tables where new rows can be added as needed in Forms. These tables can support drop-down lists, date and time selectors, numeric values, and text fields. To configure this feature for any of your existing form types, you must contact your InEight representative.

InEight Compliance integration

Task creation from document

Both in the field and in the office, project members often need to get a Compliance task marked on a file and assigned to the right team member. You can now create a task directly from the file viewer or the Links tab of any module. The task is created in Compliance and produces a bidirectional link between the two products.

To create a task from the viewer, right-click on an annotation in the PDF, and then select Link new InEight item > **Link new Compliance task**.



The New Compliance Task dialog box opens. Add the task name, due date, user contact, and description, and then click **Save**. The task is saved in Compliance and on the Links tab.

This feature is available for companies that use Compliance and have activated the integration via the InEight Integrations tab in Companies (Address book > **Companies**).

Viewer

Compare files

The Compare feature can be used to compare two documents that you have access to, for example, if you have drawings for HVAC and electrical or two revisions of the same document, you can now see how they align. The two documents are overlaid on each other to enable a side-by-side comparison. For vector files (such as DWG) an intelligent overlay occurs so that differences are automatically highlighted. For non-vector files the content is not compared, just overlaid.

To compare two different documents, select two documents in the Documents register. Expand the Actions menu, and then select **Compare**. The two documents are shown overlaid in the team view.

You can also use the compare feature to compare two revisions of the same document. To compare revisions, select any revision of a document, expand the **Actions** menu, and then select **Compare**. When prompted, you can select another revision of the document, and then click **Compare**. You can also select the two revisions of the document to compare from the Documents register.

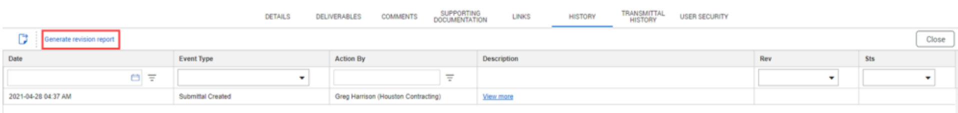
Submittals

Track revision history

You can now see the changes that have happened across multiple revisions of the submittal using the Submittal Revision report.

To generate this report, go to the History tab of a submittal, and then click **Generate revision report**.

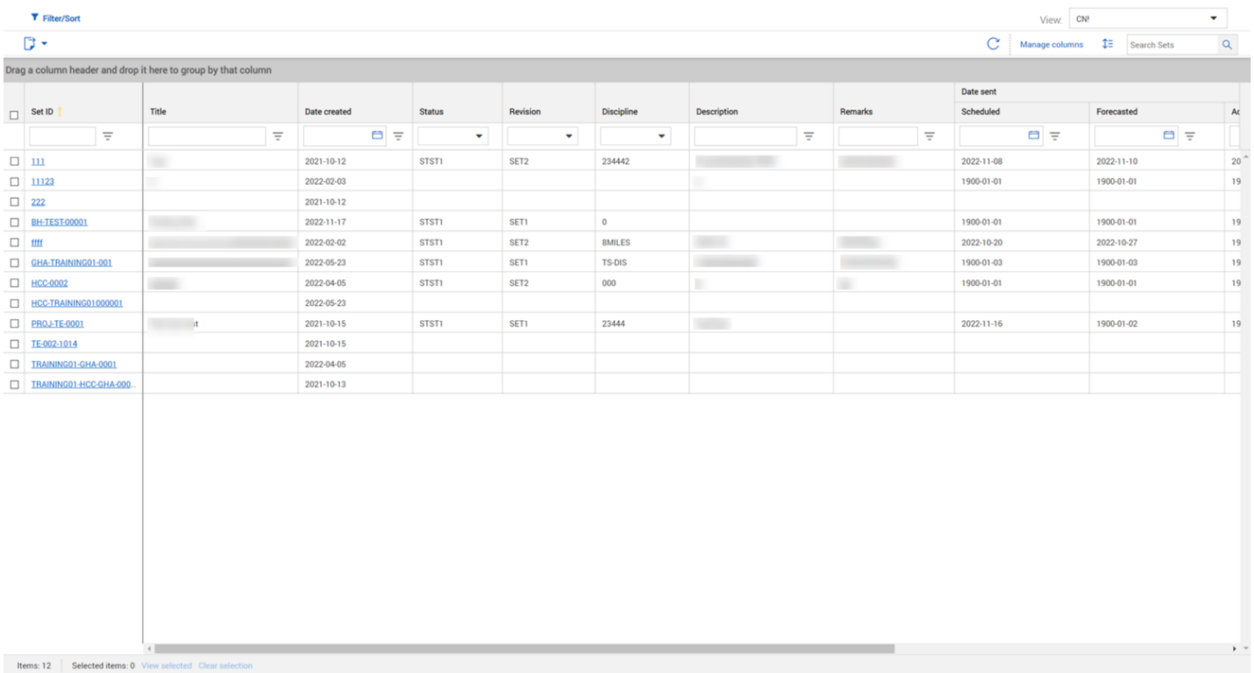
A separate window opens where you can select the revision type to see the history (that is, All revisions, Latest or All superseded revisions), and then click the **Search** button to generate the report.



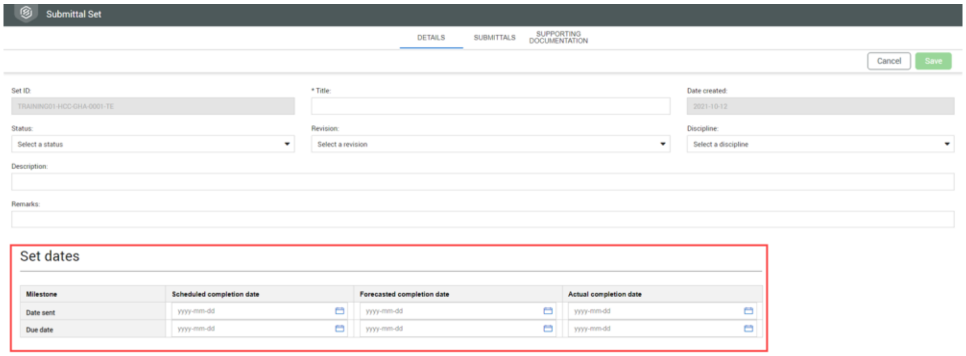
You can view the report in the window or click the **Export** icon to export it in Microsoft Excel, Microsoft Word, or PDF format.

Set Details page

The Submittals Set register has been updated to include details for each set, so you can quickly see information about the set.

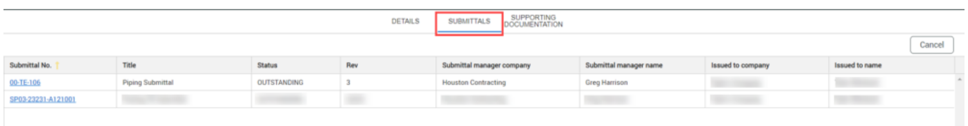


When you click on a set ID, a Details page opens. You can add information about the set, including milestone dates. You can use these fields to manually track the milestones.

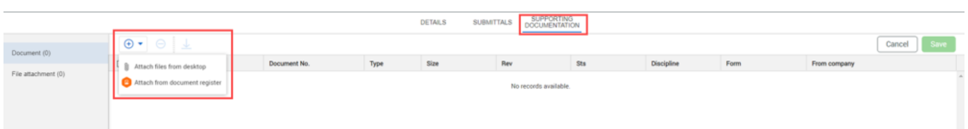


When you create a set from the Submittals register, the Submittal Set details page opens. Previously, a dialog box asking for the set ID opened.

You can see a list of all submittals in the set on the Submittals tab.



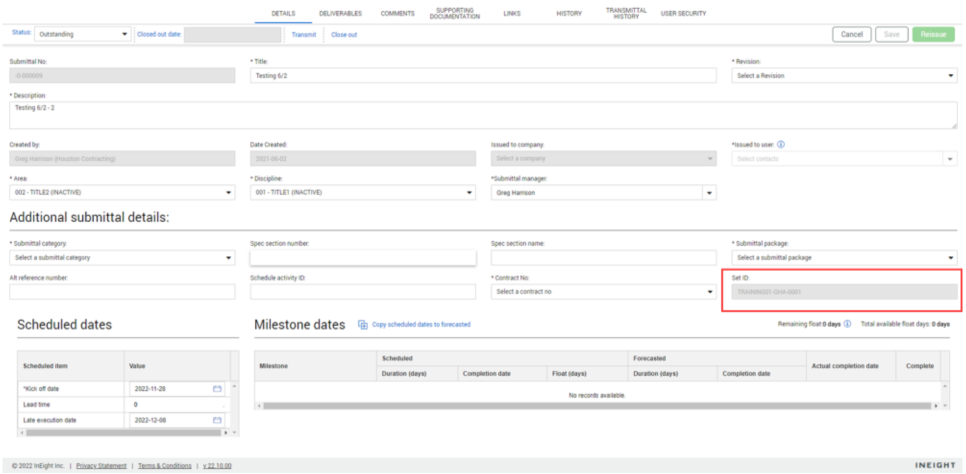
You can add supporting documents that pertain to the set on the Supporting documentation tab.



To add a supporting document, Click the **Add** icon, and then select either **Attach files from desktop** or **Attach from document register**.

Set ID field in submittals

The Set ID field in a submittal is automatically populated when the submittal is added to the set. You cannot update the Set ID field.



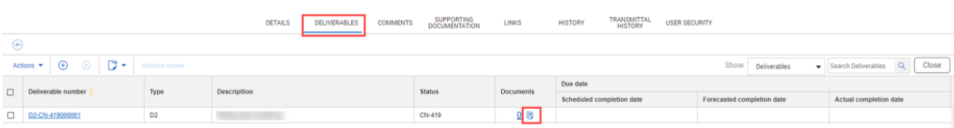
Transmittal of submittal sets

You can select a set from the Submittals Sets register, and then click Transmit > **Create transmittal**. The Transmittal Details page opens. You can then add the transmittal information, and then click **Send transmittal**. Document transmits the PDF version of the set. You can include a PDF version of a set in the transmittal.

Upload documents as a managing company

Previously, managing company users could not add documents, other than requirement documents or, or placeholder documents to the submittal. Managing company users who have been nominated as submittal managers can now add documents to the submittal.

To upload a document, click the **Document** icon in the Documents column on the Deliverables or Documents tab.



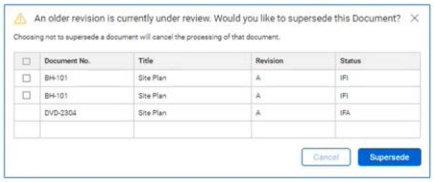
The documents page opens. Click the **Add** icon to add documents.

Documents

Holding area processing prompt to supersede documents under review

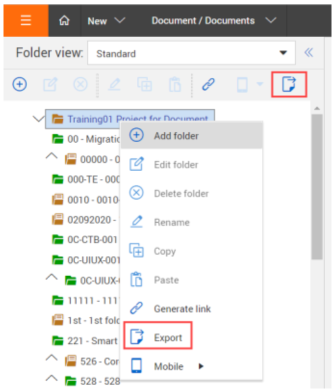
When the project Settings > Document > **Allow superseding documents under review when processing holding area documents** setting is selected, and you want to upload a new version/revision of a document that is under review, you are now prompted to either proceed with superseding some documents or cancel processing of the document from the holding area. Previously, the document was automatically superseded.

The dialog box lists the documents that are currently under review, and you can select the documents you want to supersede.

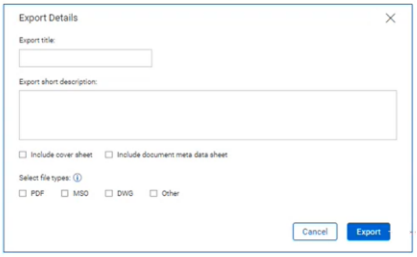


Folder export

The Export icon has been added to the toolbar and the right-click menu of standard and smart folders.



When you select the Export icon, a dialog box opens where you can add a title and description of the export file and indicate whether to include a cover sheet and metadata sheet. You can also select the file formats that must be included in the export.



The export is prepared in the background as a ZIP file. After the export has completed, a notification is sent with a link to download the zip file.

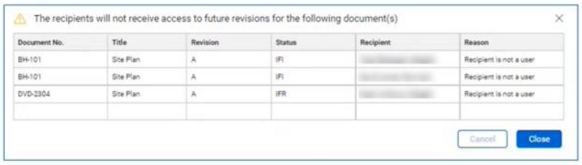
The cover sheet provides a table of contents that has links to each document in the folder. The metadata sheet shows the Excel export of the document metadata.

Note: This feature is available for standard and smart folders only.

Transmittals

Automatically notify recipients of future revisions

When a transmittal's Notify on revision option is selected, and there is a business reason that will prevent recipients from receiving access to future revisions, a warning box opens listing the names of the people who will not receive future revisions of the documents.



Mail

Option to assign reference numbers when saving drafts

When a reference number is not assigned, draft mails are assigned with a temporary reference number in the format of DRAFT-COMPANYID-AUTOSEQUENCE. This number will be replaced with the actual mail reference number when the mail is sent.

The new setting is shown below.